



## Client: Health Shield

Tisski helped growing health cash plan provider, Health Shield, make the most of Microsoft's leading CRM and ERP solutions.



Tisski were brought in to help growing health cash plan provider, Health Shield, make the most of Microsoft's leading CRM and ERP solutions, Microsoft Dynamics® NAV and Microsoft Dynamics® CRM.

## Company Background

Health Shield are a growing non-profit dedicated to providing health care cash plans and health and wellbeing benefits to companies and individuals throughout the UK. With roots that go back over 100 years when railway workers put together a cash fund to ensure that health care was available for themselves and their colleagues when needed, Health Shield Friendly Society are dedicated to providing the best services possible to their customers and members.

By moving towards a more complete, end to end software solution with Microsoft Dynamics NAV and Microsoft Dynamics CRM, not only would customers receive a higher level of service, but staff would become more efficient, and teams more aligned through transparency of accurate data and information.

## Key Benefits:

- **Increased accuracy of and access to key data** - Health Shield have increased the accuracy of their data and opened up access across new and existing business departments
- **Time savings** - noticeable time saving due to the automation of key processes
- **Cost savings** - more efficient management of paper use and distribution
- **Meeting of ambitious business targets** - CRM and NAV enable the organisation to pay 90% of claims within 2 days
- **Alignment of new business and existing business teams** - teams have access to key information as and when they need it
- **A flexible and scalable solution that will grow with the organisation**
- **Customer self-service** - offering further time savings for the customer relations team.

## Health Shield Said:

*"When looking for new software solutions it's imperative that they are flexible enough to fit in with our processes and what we want to achieve as an organisation. With some custom development, which was very easy to implement, Microsoft Dynamics NAV and Microsoft Dynamics CRM fit the bill."*

**David Algeo,**  
Information Technology Manager

## Product: Microsoft Dynamics

### The Business Challenge

Health Shield wanted to move away from using paper based processes and ineffective spreadsheets and databases. As a growing organisation with over 275,000 members, they wanted to improve the customer experience offered. After reviewing a number of solutions, Microsoft Dynamics® NAV and Microsoft Dynamics® CRM were chosen.

*David Algeo, Information Technology Manager for Health Shield, commented, "When looking for new software solutions it's imperative that they are flexible enough to fit in with our processes and what we want to achieve as an organisation. With some custom development, which was very easy to implement, Microsoft Dynamics NAV and Microsoft Dynamics CRM fit the bill."*

The key project objective was to improve and streamline processes, so that employees and teams had more time to carry out their roles. Increased accuracy and transparency of data, cost savings, and the opportunity as a not for profit to keep the organisation as lean and effective as possible were also crucial.

### The Business Solution

Microsoft Dynamics CRM and Microsoft Dynamics NAV were selected. They offered an end to end solution for both sales and marketing, for the purpose of continuing the growth of the organisation, and the customer relations team, for the purpose of offering 5 star service to members and customers. It was also important that the systems communicated with each other so that business critical data could be easily shared between the new business and existing business teams.

For this purpose it made sense to implement solutions from the same product group. Currently Microsoft Dynamics NAV and Microsoft Dynamics CRM are approaching 100 active users.

### Using Microsoft Dynamics CRM at Health Shield

Microsoft Dynamics CRM is used heavily by the sales and marketing teams to ensure that Health Shield remains on its growth path. From campaign planning and management, to the effective nurturing of leads and pipeline management, Microsoft Dynamics CRM has offered the sales and marketing teams a complete solution.

The new business side of the organisation also has access to Microsoft Dynamics NAV in order to access crucial data about their customers and members, as well as the performance of the organisation as a whole. This enables them to tailor campaigns and sales methods accordingly based on an accurate 360 degree view of their target market.

## Health Shield Said:

*"With the new solutions in place we have benefitted from slicker processes, cost savings, and environmental benefits, and we continually meet our target of paying 90% of our claims within 2 days, which is a much faster turnaround than many of our competitors. Dynamics CRM and NAV are truly essential to the smooth running of Health Shield."*

**David Algeo,  
Information Technology Manager**

# Case Study

## Product: Microsoft Dynamics

### Using Microsoft Dynamics® NAV at Health Shield

Microsoft Dynamics NAV is used to manage the accounts, cases, and health plans of both customers and members:

**Customers** – The companies offering health care to their employees across areas such as dental, physiotherapy, ophthalmics, and wellbeing services such as sports massage.

**Members** – The employees who are in receipt of the health care treatments.

Microsoft Dynamics NAV is truly the backbone of the high level of service offered by Health Shield. Microsoft Dynamics NAV has allowed time and cost savings across call management and document production and distribution, which also fits in with the organisation's desire to protect the environment.

With Microsoft Dynamics NAV the customer relations team have access to accurate data on current and past claims and the progress of payments being made. Microsoft Dynamics NAV also allows the organisation to offer customers and members the ability find out more about their case via an interactive customer portal.

Combined this has saved the customer relations team time on the thousands of claims that they handle each month, on average 37,000 claims per month, and improved the customer journey overall. At management level benefits have been seen from regular reporting and access to the full picture regarding the organisation's performance.

*David commented, "With the new solutions in place we have benefitted from slicker processes, cost savings, and environmental benefits, and we continually meet our target of paying 90% of our claims within 2 days, which is a much faster turnaround than many of our competitors. Microsoft Dynamics CRM and Microsoft Dynamics NAV are truly essential to the smooth running of Health Shield."*

## Client: Health Shield:



## Health Shield Said:

*"Tisski are great to work with, not only are they flexible in their approach so that it suits the way that we want to work, but they work hard at developing solutions so that they are the most effective based on our requirements. You speak directly to the developers so requirements don't get lost in translation and the team often build on our initial ideas so that the finished implementation is even better than first thought. I am confident that they are the right partner for us as we continue to develop and grow as an organisation."*

**David Algeo,**  
Information Technology Manager

## Client: Health Shield:



## Product: Microsoft Dynamics

### The benefits of using Microsoft Dynamics® NAV and Microsoft Dynamics® CRM at Health Shield

- **Increased accuracy of and access to key data** – by using two integrated systems and moving away from spreadsheets, paper processes, and basic databases, Health Shield have increased the accuracy of their data and opened up access across new and existing business departments
- **Time savings** – it is vital that Health Shield remain as lean as possible, Microsoft Dynamics NAV and Microsoft Dynamics CRM have enabled this through the automation of key processes, leading to noticeable time savings
- **Cost savings** – these have been achieved through more efficient management of paper use and distribution, this also supports the organisation's environmental policies
- **Meeting of ambitious business targets** – Microsoft Dynamics CRM and Microsoft Dynamics NAV enable the organisation to pay 90% of claims within 2 days, which gives them a key competitive advantage
- **Alignment of new business and existing business teams** – with the integration of Microsoft Dynamics NAV and Microsoft Dynamics CRM both new business and existing business teams have access to key information as and when they need it
- **A flexible and scalable solution that will grow with the organisation** – Health Shield is growing as an organisation so required solutions that would easily grow with them
- **Customer self-service** – the customer portal which is powered by Microsoft Dynamics NAV offers customers and members key information on their health plans and claims whenever they need it, offering increased convenience for the customer and further time savings for the customer relations team.

*David continued, "Tisski are great to work with, not only are they flexible in their approach so that it suits the way that we want to work, but they work hard at developing solutions so that they are the most effective based on our requirements. You speak directly to the developers so requirements don't get lost in translation and the team often build on our initial ideas so that the finished implementation is even better than first thought. I am confident that they are the right partner for us as we continue to develop and grow as an organisation."*

## The Future at Health Shield:

### The future of Microsoft Dynamics NAV and Microsoft Dynamics CRM at Health Shield Friendly Society

As the organisation is growing, with more customers and members coming on board daily, and with the objective of remaining as lean and effective an organisation as possible, it is essential that Health Shield adopt the latest technology. In the future this means continuing to develop the existing solutions, including the application of a single sign on option, via Health Shield's onsite development team and in conjunction with Tisski, and planning for a future upgrade to the latest versions of both systems.

## About Tisski:



At Tisski we are dedicated to making a positive difference to your business. As a provider of CRM (Customer Relationship Management) and ERP (Enterprise Resource Planning) solutions we pride ourselves on delivering world class solutions.

Our long serving, experienced team of certified Microsoft Dynamics CRM & Microsoft Dynamics NAV experts drive efficiency improvements, from lead tracking, account management, management reporting, financial management, supply chain management, manufacturing and helpdesk support.

If you are considering a CRM or ERP system, please ask about our 'zero risk, try before you buy' implementation policy. Our customers were glad they did! Contact the team today on 0247 7712050, or email [info@tisski.com](mailto:info@tisski.com).